

***California Legal Services (Title III B)***  
***PSA Level Quarterly Narrative Report***

**Fiscal Year: 2016-2017**

**Quarter: 3**

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**PSA: 1**

**Provider: Legal Services of Northern California**

**Counties: Humboldt and Del Norte Counties**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 2**

**Provider: Legal Services of Northern California**

**Counties: Lassen, Modoc, Shasta, Siskiyou and Trinity**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 3**

**Provider: Legal Services of Northern California**

**Counties: Butte, Colusa, Glenn, Plumas, Tehama**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 4**

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**Fiscal Year: 2016-2017**

**Quarter: 3**

**Provider: Legal Services of Northern California**

**Counties: Yolo**

Optional Success  
Story(ies)/Case Summary(ies)

Mr. M contracted LSNC after his doctor informed him that he only had about a week to live. Although still relatively young, he had chronic health conditions that shortened his life. He owned a mobile home and personal property but had not created any testamentary documents. With time running short, he was stressed about completing end of life forms and ensuring the safety and stability of his family. LSNC staff visited Mr. M in his home. After determining he had capacity, LSNC staff ascertained his wishes and assisted him with his will. Mr. M died less than a week later. The executor will not be able to carry out his wishes by transferring title to his mobile home and personal property to his beneficiaries.

Ms. X owns a mobile home and resides in a seniors-only mobile home park. She was awarded guardianship of her grandson, who is in elementary school. The Park served her with a notice to comply with the Park rules by removing him from the home because the Park is for seniors-only. She was concerned about losing her investment in the home and having to move. She contacted LSNC for assistance. LSNC negotiated with the Park's attorney and although California law would have permitted the Park to evict her, the client was able to remain in the Park with her grandson.

Ms. Z is a 70 year-old hearing loss. She purchased hearing aids from a national company after seeing their advertisement in the local paper. She told the person she met with that she wanted the exact hearing aids mentioned in the ad but when she met with the company, she was told she needed a different hearing aid than the one her doctor recommended and different from the one advertised. She was convinced to pay almost \$4000 for the hearing aids but when she received them, they did not work. She asked the company to fix them but they refused. She contacted LSNC for assistance with rescinding the agreement she signed and obtaining her money back. LSNC wrote a demand letter and negotiated with the company. LSNC also assisted the client with filing a small claims court action. After service of the complaint, the company refunded Ms. Z her out of pocket costs for the hearing aids and agreed to rescind the agreement.

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC staff holds office hours at the following locations: Esparto: 1st Thursday of the month, every other month at RISE; West Sacramento: 4th Thursday of the month at the Senior Center; Knights Landing: As needed, 1st Monday of the month at the Center for Families; Winters: date to be determined. The RISE seniors group no longer meets so we are searching for alternative outreach opportunities in Winters. Clarksburg: 3rd Thursday of the month at the Yolo County library. Davis: 1st Monday of the month at Grace in Action (housed at the United Methodist Church). In addition, LSNC attends monthly meetings of the Multi-Disciplinary team with APS, HHSA, and other advocates for older adults. LSNC also participates in regular meetings of the Yolo County Health Aging Alliance (YHAA) and chairs the YHAA Collaboration Subcommittee attended by Yolo County senior providers, including the Food Bank, Elderly Nutrition Program, Adult Day Health Center, Supervisor Provenza's staff, Yolo Hospice, Department of Health and Human Services, Veteran's Services, and representatives from the three Senior Centers. LSNC is also participating in planning meetings for the Yolo County ADRC and the Yolo Center for

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Aging. 72.30 124.50 9.70 0	Legal representation: Legal Advice/Assistance: Community Education: Special Outreach: Total Hours: 206.50
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**Provider: Yuba Sutter Legal Center**

**Counties: Sutter and Yuba Counties**

Optional Success  
Story(ies)/Case Summary(ies)

Legal assistance hours for the quarter include 215.75 for Sutter County and 176.50 for Yuba County (392.25 total). Legal representation hours include 13.75 for Sutter County and 22.50 for Yuba County (36.25 total). Grand total of service units for the 3rd quarter of FY 16/17 total 428.50 hours. The community education activities were five for Sutter County with 8.50 hours and three for Yuba County with 4.25 hours (12.75 total).

Optional Information on  
Collaboration with Other  
Advocacy Groups

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**Provider: Sacramento Senior Legal Services**

**Counties: Sacramento**

Optional Success  
Story(ies)/Case Summary(ies)

A married couple in their seventies received a number of notices from the Social Security Administration ("SSA") terminating their Supplemental Security Income ("SSI") and demanding the couple repay over \$6,000.00 in SSI benefits that SSA had supposedly overpaid them. The notices alleged that they owned assets that exceeded the \$3,000.00 resource limit for a married couple receiving SSI. Although the husband and wife individually appealed SSA's termination of each person's SSI benefits, the SSA only scheduled a hearing for the husband. A hotline attorney drafted multiple letters on behalf of the couple to request that SSA schedule a single hearing to consider both the husband's and wife's issues. SSA did so, and the hotline attorney represented the couple a hearing before an administrative law judge ("ALJ"). In a written decision, the ALJ determined that the couple in fact did not possess assets in excess of the \$3,000.00 resource limit, and determined that the SSA should not have terminated the couple's SSI and that the SSA did not overpay any SSI benefits to the couple.

A man in his sixties received a notice of termination of tenancy from his property manager, alleging the man had engaged in a violent confrontation with a neighbor. The man's landlord subsequently filed an unlawful detainer action in superior court to attempt to evict him. A volunteer attorney advised the client about timely filing an answer with the courthouse to avoid a default judgment against the client. A hotline attorney then contacted the client and discussed the defenses he could raise in court, as well as ways to negotiate a possible settlement with the landlord's attorney. The hotline attorney reviewed a number of documents and advised the client about the relative strengths and weaknesses of his case. With the volunteer and hotline attorneys' advice, the client negotiated a settlement with the landlord's attorney to move from the property and avoid a judgement against him.

A woman in her eighties moved from a different state to California about five years ago. Before leaving, she moved some possessions to a storage unit in the prior state, and has been paying space rent for the storage unit since. Recently, the client experienced some problems paying the rent; the storage company then demanded that the client immediately pay the rent in arrears or that they would sell her property in the storage unit. The client indicated that she did not have friends or family in either California or Texas that could help her with this issue. A volunteer paralegal informed the client that the hotline could not advise her about the laws of another state. However, the paralegal promptly researched the contact information for legal aid organizations and attorney referral services in the state where the storage unit is located, and referred the client to these organizations for the client to immediately seek assistance.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Total Units of Service for the Quarter: 569; of this, total Case Work hours: 539; total Outreach/Community Education Activities: 7; total Community/Legal Education Programs: 23.  
Total Representation hours: 50.4

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**Provider: Legal Services of Northern California**

**Counties: Nevada, Placer, Sierra**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

LSNC advocates continue to collaborate with a wide variety of elder and disability rights groups locally, statewide and nationally. Due to the confidential nature of the legal services we provide we are not always able to report with whom we are collaborating at the time we are doing so. For example, this office has collaborated in the past with the California Department of Justice, various district attorneys' offices, law enforcement and medical/social service providers on cases for our older clients.

January 2017 -  
None.

February 2017 - LSNC advocates coordinated services with Adult Protective Services and VA caseworkers to maintain the housing of several veterans in Placer County. LSNC met with one of these veterans in his/her home to evaluate potentially life threatening habitability issues and coordinate medical, transportation and social services.

March 2017 - LSNC advocates provided a training to Placer Senior Peer Counselors about how to spot unfair and deceptive debt collection practices for vulnerable adults. LSNC provided an overview of LSNC services to older adults in Placer County.

**PSA: 5**

**Provider: Legal Aid of the North Bay**

**Counties: Marin County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 6**

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**Provider: Nihonmachi Legal Outreach dba API Legal O Outreach**   **Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Our client is a seventy-year old Bengali woman who sought to apply for naturalization with an N-648 waiver. Her case was complicated by two factors: 1) long absences outside the U.S. within the five year period; and 2) a relatively weak N-648 waiver which attributed her inability to learn depression and some mental deterioration. We worked with the client's adult daughter to get evidence that her absences were due to medical care for her ailing husband as well as care for her adult daughters, whom she feared might suffer attacks without her constant presence. As for the medical exam, we advised the client and her family that the odds weren't great, and she prepared and studied to take the test. At the interview, the officer was more focused on the abandonment issue, but was satisfied with the evidence we presented. She also accepted the N-648 waiver without question. Our client recently took the oath of citizenship and became a U.S. citizen.

Optional Information on  
Collaboration with Other  
Advocacy Groups

APILO continues to host an API Elder Abuse Task Force for our community-based partners to address issues of safe and secure living for elders and adults with disabilities. We are currently planning a brown bag series for both the general public and CBO's. APILO is also an active member on the San Francisco Long Term Care Coordinating Council (LTCCC) that advises the Mayor on issues surrounding services for elders and adults with disabilities in the city, specifically in the subcommittee on housing, focusing our efforts on the current housing crisis. In addition, we work with the Family Violence Council and Department on the Status of Women around issues of Elder Abuse. As a founding and active member, we meet with other community based agencies, the DA's office, Victim Witness services, and Adult Protective Services, sharing best practices and ways to better service limited English-speaking elders and people with disabilities. Two of our attorneys are also on the Aids legal Referral Panel, where along with other requirements: clients are entitled to an initial hour of consultation free of charge; simple wills, DPAs, and declarations to physicians are provided at no charge; and each attorney takes at least two cases per year from the panel. API Legal Outreach remains a legal and technical resource for every partner organization and collaborative in the areas of elder law and abuse.

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**Provider: Legal Assistance to the Elderly**

**Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Our client is 71 years old and blind. About three years ago, his daughter and her boyfriend moved themselves into his unit. The boyfriend was very abusive to both our client and his daughter. In early 2016, our client had surgery related to lung cancer and went to a friend's home to recuperate. When he tried to move back into his rental unit, his daughter's boyfriend threatened him and prevented him from returning home. With no means to afford alternative housing in San Francisco, our client became homeless. Subsequently, the landlord brought an eviction action against our client, his daughter and her boyfriend based on a long list of acts constituting a nuisance. Further, our client's daughter and her boyfriend had not paid rent for 13 months. LAE negotiated a settlement that allowed our client to return to his home, at his previous rent, after his daughter and her boyfriend vacated pursuant to a separate settlement agreement. LAE, working with the Institute of Aging also helped our client secure all the back rent owed from various rental assistance agencies. We also worked very closely with APS in this case.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We continue to collaborate very closely with APS and other community agencies. APS is involved with more than half of the cases we work on. We also collaborate with other non-profits that represent tenants in Unlawful Detainers, particularly, Bay Area legal Aid and the Justice and Diversity Center's Homeless Advocacy Project. Similarly, we have a very close working relationship with the Eviction Defense Collaborative.

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**Provider: Asian Americans Advancing Justice - Asian I Counties: San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

Client K is a 62 year-old retired, disabled man whose only sources of income are Social Security and food stamps. He spends about 75% of his limited income on rent. Mandarin is his primary language. For over a decade, Client K has lived on the first floor of a subdivided single family home. Client K's landlord lives on the second floor of the home and the basement of the home is shared among a number of tenants, including a person called T. The landlord sought to evict client K by arguing that the protections of the San Francisco Rental Ordinance did not apply because the landlord and Client K lived in the same rental unit. In other words, the landlord falsely claimed that he and Client K were roommates, and so the landlord could evict Client K for any reason. When discussing this case among the tenant lawyers in San Francisco, it came to light that the landlord was also trying to evict T, using the exact same argument- that the landlord and T were roommates, and so the landlord could evict T for any reason. Based on the layout of the home, it was clear that the landlord could not have been roommates under the law with both Client K and T because they each had separate spaces. The landlord was acting in bad faith and trying to evade the protections of the San Francisco Rental ordinance. Thankfully, because of our strong partnerships with our fellow community organizations, we were able to share both factual and legal knowledge that enabled us to fight the landlord's eviction of Client K. In late March 2017, the landlord voluntarily dismissed the lawsuit against Client K. For the time being, Client K will be able to stay in the home he has lived in since 2005.

Optional Information on  
Collaboration with Other  
Advocacy Groups



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**Provider: La Raza Centro Legal, Inc.**

**Counties: City & County of San Francisco**

Optional Success  
Story(ies)/Case Summary(ies)

In the month of January, I took on a Federal Social Security Disability claim that had landed in federal court. The claim concerned inappropriate denial of certain social Security Benefit entitlements to Social Security Disability and Supplemental Security Income and amounts to the client over a period of 4 years. I prepared the case, reviewing voluminous medical, legal, and financial records to establish legal arguments for eligibility for benefits, satisfaction of legal requirements, existence and severity of disability, limitations on ability to work, educational and work-related history, and overall entitlement to benefit amounts. I met with the client on numerous occasions, prepared home for the hearing, asked him direct examination questions, and presented my legal arguments and presentation to the client for discussion. We sat for the hearing and I submitted supplemental arguments to the court along with further medical and other documentary evidence. A few months later, I received a favorable ruling from the judge that we had succeeded in the litigation and had established his eligibility for benefits. He will receive anywhere from 3000,00 to 600,000 dollars in benefits pending yearly review of his benefits and his living out his life expectancy. He also will receive a substantial amounts in back benefits.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Monthly Legal Clinic with Curry Senior Center first Thursday of the month. Monthly Latino Partnership for Service Providers meetings and presentations to groups of Service Providers including caregiver alliance. Monthly outreach presentations on legal topics to local Mission Community. Monthly collaboration with Non-Profit Attorneys in housing cases and clinics.

**PSA: 7**

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**Provider: Contra Costa Senior Legal Services**

**Counties: Contra Costa**

Optional Success  
Story(ies)/Case Summary(ies)

Donna F. is a 61 year-old woman living in Pleasant Hill. Donna has severe health problems that have left her nearly paralyzed. When she was the victim of identity theft, we were able to go to her home to meet with her and help her organize her response to the flood of new account notices she began receiving. We helped her file a report with the Federal Trade Commission and created an affidavit of identity theft she could send to the companies where fraudulent accounts were opened in her name. Our staff even went to her home to notarize the affidavit.

Maggie P. is an 84-year-old widow who was taken advantage of by an unscrupulous salesperson. He led her to believe he worked for the company that provided her security alarm service, and told her the equipment needed to be replaced. She unknowingly signed a new 5-year contract with the second company, and was left paying for two contracts, each with steep cancellation penalties. We successfully negotiated an agreement with the second alarm company to release her from her contract without penalty and to leave behind the equipment at no cost to her.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We are coordinating with the area Ombudsman Services organization to provide services to residents of board and care facilities.

**PSA: 8**

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**Provider: Legal Aid Society of San Mateo County**

**Counties: San Mateo**

Optional Success  
Story(ies)/Case Summary(ies)

Client v. California FAIR Plan Association, et al, (Super Ct. San Mateo County, 2016, No. 535665) Client came to Legal Aid in 2014 after her insurance company denied her claim for losses suffered from a fire. Shortly after the fire, the County required her to relocate because her house was uninhabitable. She was forced to use her only income, her Social Security benefits, to pay rent until she could get the funds to repair her home. Unfortunately, FAIR Plan initially denied her claim because her name was not recorded as the owner of the house. (the original owner had moved out of California after selling her home to the client, and prior efforts to locate her were unsuccessful.) However, FAIR Plan had not questioned the client's ownership before and had accepted her insurance premium payments for over 30 years. Legal Aid's Senior Advocates program asserted the client's rights. Although the insurance company later acknowledged that she did have an insurable interest, it refused to process her claim unless she waived any potential legal claims against the company. Legal Aid brought in a pro bono law firm, Perkins Coie, LLP, to try to negotiate a settlement without litigation. But, when these efforts failed, Legal Aid and Perkins Coie filed a lawsuit in 2015. Perkins Coie also helped Legal Aid locate the original seller of the client's house so that she could secure the deed needed to transfer the title of the house officially to the client. After a year of litigation and negotiation, California FAIR Plan agreed to compensate the client. Although the terms are confidential, the settlement allows the client to repair her home and move back in. Throughout the case, Legal Aid worked extensively with the client's APS social worker to keep the client informed and involved with both the insurance case and the efforts to record her ownership of her house to avoid future problems.

Optional Information on  
Collaboration with Other  
Advocacy Groups

No new collaborative activity this quarter.

**PSA: 9**

**California Legal Services (Title III B)**  
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**Provider: Legal Assistance for Seniors**

**Counties: Alameda County**

Optional Success  
Story(ies)/Case Summary(ies)

Legal Assistance for Seniors assisted a 84 year-old man renew his legal Permanent Resident Card. Mr. R contracted LAS through his social worker after he realized that his green card had expired. Mr. R was trying to move into senior housing but was unable to move into an open unit because he did not have valid proof of his residency status. LAS assisted Mr. R and his social worker in completing the Application to Replace Permanent Resident Card and a Request for Fee Waiver. With LAS' assistance, Mr. R successfully obtained his new green card. With his new green card, Mr. R and was able to stabilized his housing.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Assistance for Seniors (LAS) works closely with Alameda County APS to service clients suffering from or at risk for elder abuse by providing legal services for clients in need of legal advice and/or protections. LAS has also been awarded the Alameda County HICAP contract and provides HICAP counseling services as well as legal services for HICAP clients. LAS collaborates with the Contra Costa County HICAP program and provides legal services for clients referred to LAS by Contra Costa HICAP counselors. LAS also works with the Alameda County Ombudsman to serve clients in residential facilities. Additionally, LAS works with the Alameda County Department of Children and Family Services to serve clients needing assistance in obtaining legal guardianship of minors. LAS' is a participating agency in the Northern Alameda County Kinship Collaboration and provides legal services to relative caregivers of minors. LAS also maintain collaborative relationships with the State Bar of California and the cities of Alameda, Fremont, Hayward, Livermore, and Pleasanton to provide legal services to seniors as well as educational presentations and referrals to other community resources.

**PSA: 10**

**California Legal Services (Title III B)**  
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**Provider: Senior Adults Legal Assistance (SALA)**

**Counties: Santa Clara County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

Collaboration With Senior Centers and Other Sites to Deliver Services  
For the 3rd quarter of 2016-17, SALA provided on-site legal service intake appointments at 24 senior centers or sites in Santa Clara County. These sites included: These sites included: Avenidas Senior Center and Stevenson House (in Palo Alto), Mountain View Senior Center, Sunnyvale Community Services, Santa Clara Senior Center, Milpitas Senior Center, Cypress Senior Center (San Jose), Cupertino Senior Center, John XXIII Senior Center (operated by Catholic Charities in San Jose), Roosevelt Community Center (San Jose), Alma Senior Center temporarily located at Gardner Community Center during Alma's renovation (San Jose), Seven Trees Center (San Jose) Eastside Senior Center (San Jose), Campbell Adult Center, Willows Senior Center (San Jose), Camden Community Center (San Jose), Almaden Senior Center (San Jose), Los Gatos Recreation Center, Saratoga Senior Center, Evergreen Senior Center (San Jose), Southside Senior Center (San Jose), CRC Senior Center (Morgan Hill), and Gilroy Senior Center. Staff at these sites scheduled SALA's appointments and the sites also provided a private interview room free of charge.

**PSA: 11**

**Provider: Council for the Spanish Speaking**

**Counties: San Joaquin**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 12**

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**Provider: Catholic Charities**

**Counties: Alpine, Amador, Calaveras, Mariposa, Tuolu  
mes**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 13**

**Provider: Senior Citizens Legal Services**

**Counties: Santa Cruz and San Benito**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 14**

**Provider: Central California Legal Services Inc.**

**Counties: Fresno and Madera**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 15**

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**Provider: Central California Legal Services, Inc.**

**Counties: Kings County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**Provider: Central California Legal Services, Inc.**

**Counties: Tulare County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 16**

**Provider: California Indian Legal Services**

**Counties: Inyo & Mono**

Optional Success  
Story(ies)/Case Summary(ies)

As we now have an emphasis to focus of our services towards more legal and community education including referrals, we are currently planning to host 1-2 community education presentations at separate senior centers in the community for the upcoming quarter and provide continued distribution of recently updated referrals and self-help packets. During this quarter the following materials were distributed to seniors: Self-Help Packet	2 - Power of Attorney (POA) - 5 - Advance Health Care Directive - Self-Help Packet
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Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 17**

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**Provider: Senior Legal Services?**

**Counties: Blank**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 18**

**Provider: Grey Law of Ventura County**

**Counties: Ventura**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 19**

**Provider: Bet Tzedek**

**Counties: Los Angeles**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 20**



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**Provider: Inland Counties Legal Services**

**Counties: San Bernardino**

Optional Success  
Story(ies)/Case Summary(ies)

Case #1: 16E-7001414

A 72 year old divorced senior sought ICLS assistance regarding one of her sons. The client has 2 sons, one is a "good" son, respectful, works, helps care for the client; and the other son is the opposite. When the son lost his job due to a DUI the client agreed to help him out and allowed the son as well as his 13-year old son to move into her home until he got a job and back onto his feet.

After over a year the son has not found a job and refused to look for work. The grandson causes a lot of trouble and problems between the client and her son. He lies, has no respect for his grandmother's property and is very disrespectful refusing to obey her. The grandson's father always takes his son's side and refuses to discipline him. Additionally, the client is no longer able to support them.

On several occasions the police have been called due to arguments between the client and her son over the grandson because the grandson had run away. The client had asked the son to move and take her grandson with him many times but he had refused. When the "good" son got fed up he requested that the client have his brother legally evicted. Even though the client was hesitant, she knew that she had to do something and came to ICLS.

The ICLS advocate advised the client that she would first have to serve both her son and her grandson with a "30 Day Notice To Terminate Tenancy". Even though her son had been living there for over a year there was no written or verbal rental agreement. The advocate advised the client that if, after 30 days they still had not moved out she would need to file an Unlawful Detainer lawsuit and that ICLS would be able to assist her with preparing the documents. The advocate prepared the "30 Day Notice to Terminate Tenancy" for the client to serve her son with. After 30 days he still refused to move.

The advocate then prepared an Unlawful Detainer and Fee Waiver documents for the client and provided her with instructions. The advocate advised that the son would have to be served and that he would have 5 days from the date of service to file a response with the court and a hearing would be scheduled. If the son did not respond or if the court ruled in her favor, the client would be able to have the Sheriff evict him if he still refused to move out.

The client advised the advocate that her son and grandson had finally moved out on the day the Sheriff was scheduled to evict him from her home.

Case #2: 17E-7000851

ICLS's client is a fragile senior with In Home Supportive Services (IHSS). He was notified that he now has a "share of cost" that he had not previously had in the amount of \$1,237. His wife's income was assessed by the Social Security Administration (SSA) and it was determined that for a married couple they were over income. The client explained that he could not afford his medications and co-payments for exams that he needed. He has Chronic Obstructive Pulmonary Disease (COPD).

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After further investigation and consultation with an ICLS attorney, the advocate searched other programs including the 250% Working Disabled Program. The client appeared to qualify for this program which would eliminate his "share of cost". The advocate made an appointment with the client and provided him with a declaration to submit to his eligibility worker and advised him to keep his receipts from his recycling as proof that he is working. The client was glad that he would be able to eliminate his "share of cost" so that he would be able to receive full Medi-Cal benefits.

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 21**

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**Provider: Inland Counties Legal Services, Inc.**

**Counties: Riverside**

Optional Success  
Story(ies)/Case Summary(ies)

Cases #1 & #2: 16E-2010284 & 16E-2010237:

ICLS's client is an 84 year old disabled senior living in rural Riverside County. She is at 116% of the poverty level and owns no real property. Her assets include a checking account with approximately \$1,000 at any given time and her personal belongings have little value. She has chronic obstructive pulmonary disease (COPD) as well as other declining health conditions, is on oxygen 24/7, is homebound and has limited physical mobility.

The client has resided with her friend and caregiver for about 8 years and receives In Home Support Services (IHSS) through her Medi-Cal benefits. Both the client and her caregiver volunteer at the Banning Senior Center.

The client first asked for ICLS services in December 2016. She was unable to attend her initial appointment and requested a home visit which was made by the ICLS advocate. The advocate, having known the client for some time, determined that there was no reason to doubt or question the client's mental capacity. She is able to take care of most of her needs on her own and appears to be well cared for but relies on her caretaker to handle household chores and run errands. The advocate observed that the client has her own bedroom and bathroom and met with the client in the family room where she had been crocheting and watching television. The client currently has a Do Not Resuscitate (DNR) in place and in full view for paramedics to see if they are called into the home. She wanted the advocate to prepare a Power of Attorney Advanced Health Care Directive (POA AHCD) designating her friend and caregiver able to act upon her incapacitation that did not conflict with her DNR. Additionally she requested that a General Power of Attorney (POA) be prepared.

The advocate prepared both documents and witnessed the client's signature on the AHCD and informed the client that this document would still need to be notarized. The client has since notarized the document and a notarized copy has been retained in the client's file.

Case #3: 17E-2001830

This ICLS client had been previously helped with having her Medi-Cal restored after she had been found to be ineligible. She came to ICLS with a new legal issue – Section 8 Housing.

The client had received a Section 8 voucher that she needed to activate by finding a place to move in to. The Housing Authority (HA) provides first 30 days and then an additional 30 days if necessary to find a place to live otherwise they will then terminate your voucher. This Section 8 voucher is all that stands between the client and homelessness because under Section 8 the HA help supplements the rent by paying all but 35% of whatever the client's income is. This would allow the client to live a decent live with decent shelter that she would never have been able to afford without this supplement.

The client's time was running out and she had not been able to find housing. Due to her age she was unable to use the internet to look for vacancies through the HA's portal. The advocate downloaded the

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printed listings of vacancies for the client and contacted the Director requesting that the HA assist the client in locating an apartment. The Director said that this would not be a problem and would have a worker assist the client.

It takes years and years to obtain a Section 8 Voucher which is valid nationwide and for as long as a person is eligible. To have a Section 8 Voucher terminated would be disastrous so helping a client avoid this was a critical service to this senior.

Case #4 17E-2003408:

ICLS's client is a 66 year old disabled gentleman living in rural Riverside County and is a minority in the greatest economic need at 74.14% of the poverty level. He lives with his significant other who receives SSI only.

The client had applied for Social Security Retirement (SSA) benefits as well as SSI benefits just before turning 65 and was granted both.

He asked for help from ICLS when he was notified that Social Security had terminated his SSI within a couple of months and were charging him with an overpayment of \$1,400.

The SSA had determined that he had other resources, specifically 2 other pensions. He stated that he was not entitled to other pensions but may have not fully understood SSA's line of questions. SSA had treated him poorly and would not allow him to explain.

The ICLS advocate told the client that he should file for reconsideration and to contact his local congress person and stress that he needed an expedited response from SSA. He was contacted almost immediately by SSA and shortly received a scheduled hearing.

The advocate represented the client at his Administrative Hearing in January 2017. She argued that the client did not qualify for other pensions and provided the same proof that had been provided to the client's local SSA office previously. She also argued that the client was entitled to receive retroactive SSI and continued benefits according to the Code of Federal Regulations (CFRs).

The February 2017 Administrative Hearing decision was fully favorable to the client. He was determined to be eligible for SSI benefits in the amount of \$466.50 monthly between October 1 and December 1, 2015. He had not been overpaid. The evidence as a whole, including the submissions from both institutions and the claimant's sworn testimony all supported the conclusion that the claimant had not been receiving payment from a pension.

The client's local SSA office contacted him even prior to his receipt of Notice of Decision. He will soon begin receiving his reimbursement from the 2015 period which is approximately \$2,488 and will continue his monthly benefits of \$466.50 beginning March 1, 2017. He will get Medi-Cal which will pay his Medicare Part B premium of \$104.50 per month.

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Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 22**

**Provider: Legal Aid Society of Orange County**

**Counties: Orange**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 23**

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**Provider: Elder Law & Advocacy**

**Counties: San Diego**

Optional Success  
Story(ies)/Case Summary(ies)

**Case #1**

Ms. H, on a month-to-month tenancy, received from her landlord a 30-day notice of a monthly rent increase to \$705 effective January 5, 2017. The lowest monthly rent she had paid in the previous 12-month period was \$640. Mrs. H was advised that because the increase of \$65 was greater than 10%, albeit only by the slim margin of \$1.00, Mrs. H was entitled to a full 60-days advance notice of the increase pursuant to Civil Code Section 827(b).

Ms. H was guided in the preparation of a letter to her landlord pointing out her right to 60 days advance notice of the increase. Ms. H also enclosed with the letter a "Payment in Full" check for the existing rent due in January. In a follow up call from Elder law & Advocacy, the landlord confirmed that he had deposited Ms. H's check and would be sending her a new 60-day notice in due course.

**Case #2**

Our 93 year old client had gone to a hearing aid supplier to be fitted for hearing aids. After paying almost \$4,000 for new hearing aids, Ms. R found them to be uncomfortable to the point that she could not wear them. She went back in to have them adjusted. In fact, over the following months, Ms. R returned to the store over 10 times in order to attempt to have them adjusted. She was never successfully fitted for the hearing aids and, subsequently, never used them.

Eventually, Ms. R requested that her money be refunded. The supplier refused, citing a clause in the contract that required a return within 2 months of the purchase.

After Ms. R came to Elder Law & Advocacy, the staff attorney drafted a demand letter. The letter requested that the original payment be refunded to the client. The letter also outlined possible punitive damages available to the client if she was forced to resort to litigation in order to recover her payment.

The supplier refused to refund the money.

Ms. R sued the supplier in Small Claims Court. The client recounted to us that she handed our demand letter to the judge when she began to describe what had taken place. By the end of the hearing, the judge had gone through the letter in detail and had used it to award Ms. R her initial payment, plus over \$6,000 in punitive damages. The ultimate award was for \$10,000, the maximum that can be awarded in Small Claims Court in California

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 24**

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**Provider: Elder Law & Advocacy**

**Counties: Imperial**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 25**

**Provider: Bet Tzedek**

**Counties: Los Angeles**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 26**

**Provider: Legal Services of Northern California**

**Counties: mendocino and Lake**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 27**

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**Provider: legal Aid of Sonoma County**

**Counties: Sonoma**

Optional Success  
Story(ies)/Case Summary(ies)

This month an elder law client came to us with concerns of spousal abuse. Legal Aid's elder law attorney helped her obtain a move-out order against her spouse. Subsequently, the Housing Authority invited our client to a hearing pending the loss of her voucher due to the family break-up. The client and her attorney analogized elder abuse to domestic abuse, arguing that the Housing Authority should grant the voucher to the elder abuse survivor, as it does with domestic abuse. The client prevailed yet again, kept her voucher and returned home safely.

(Note the number of Cases  
Opened is higher than the unduplicated client count, because some clients had more than one open case during the quarter.)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 28**

**Provider: BAY AREA LEGAL AID**

**Counties: NAPA**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups



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**Provider: Legal Services of Northern California**

**Counties: Solano County**

Optional Success  
Story(ies)/Case Summary(ies)

1. Ms. S. came to our office after receiving a 60 Day Notice from her mobilehome park manager. Client felt the notice was bogus and in retaliation for her refusal to sell her mobilehome. Our office attempted to negotiate a move-out settlement prior to the UD but could not reach an agreement with the opposing party. A UD was filed after the 60 Day Notice expired and our office assistance the client with responding. Our office negotiated with the opposing counsel again and were able to reach a settlement favorable to the client. The client was given an extra month and a half to vacate and the park owner agreed to pay the client \$8000 to buy the trailer. The parties agreed to stipulate to masking so the UD should not appear on the client's record moving forward. 2. Ms. R. came to us because she was being harassed by creditors and collection agencies. Our office agreed to write a debt dispute letter for the client to send to one of the collection agencies. Our office also assisted the client in filing a consumer complaint with the Consumer Financial Protection Bureau. Our office provided the client with several self-help materials for assistance with repairing her credit.

Optional Information on  
Collaboration with Other  
Advocacy Groups

Continued collaboration with Ombudsman Services of Northern California and Senior Legal Hotline. Continued participation with community groups including: Solano Senior Coalition and Vallejo Senior Roundtable

**PSA: 29**

**Provider: Senior Legal Services**

**Counties: El Dorado County**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups

**PSA: 30**

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**Provider: Dor v' Dor Senior Advocacy Network**

**Counties: Stanislaus**

Optional Success  
Story(ies)/Case Summary(ies)

A case came into our office about a 90 year-old woman who had loaned \$14,000 to a woman who befriended her claiming she needed money for her son who had cancer and many other "stories". She filed a police report but the DA declined the case. We contacted the Modesto Bee and a story was published about this woman and several other victims on the front page of the Sunday paper. A DA in San Diego heard about the case and through our contacts, was put in touch with the Stanislaus County DA's office and the DA has now decided to reopen the case. Several more victims came forward based on the story.

Optional Information on  
Collaboration with Other  
Advocacy Groups

We continue to work closely with the Ombudsman office, APS the DA's office on elder abuse cases occurring in assisted and skilled nursing facilities.

**PSA: 31**

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**Provider: Central California Legal Services**

**Counties: Merced**

Optional Success  
Story(ies)/Case Summary(ies)

January 2017 - Client, a senior, was wrongfully billed over \$4,000.00 for a medical visit, though his Medicare supplemental plan should have covered the medical bill, as he was referred out of network specifically for a second opinion for his health condition. However, the supplemental plan insurance company refused to pay the bill, leaving the doctor's office to bill Client I full, alleging he had not submitted a timely change of doctor notice. The CCLS attorney contacted the doctor's office to clarify the referral and submitted an appeal to the insurance company. The insurance company approved the payment upon appeal, and the doctor's office agreed to take the insurance payment as payment I full, writing office any balance unpaid for by insurance and not billing Client further. As such, Client is a much more ease of mind and has had a \$4,000 bill covered and waived.

February 2017 - CCLS Case No. 17E-3010122 (personal Property, Other Individual Rights) CCLS was contacted by a senior at Anberry Rehabilitation Hospital that was having issues with his daughter. Client complained that his daughter was not returning his car that he had lent to her after he was suddenly and involuntarily admitted to Anberry. The CCLS staff attorney investigated the situation for possible elder abuse issues, but determined instead that it was more of a personal property and individual rights dispute over possession of the car. The CCLS staff attorney prepared and sent client's daughter a formal demand letter and later spoke with her over the phone, demanding that she return her father's car so that he could look for alternate and independent living housing outside of Anberry, as he desired. After some back and forth, client's daughter agreed to and did in fact return client's car to him at Anberry a few days later. Client is relieved to have his car back and is now working on getting his license renewed and finding independent alternative housing outside of Anberry.

March 2017 - Case 16E-1000143 (Dept. Collection/Consumer) CCLS was contacted by a senior who had purchased a car and then tried to return it, only to be told that he was outside of the contract cancellation window. The credit union underwriting the loan then repossessed the car anyway and sold it, and went after Client in a lawsuit for a deficiency judgment between the original loan amount and the sale price of the sale price of the car, which was nearly \$7,000. The total amount demanded was approximately \$10,000.00 including court costs and attorney's fee that quickly accrued after they sued him for repayment. Client could not possibly pay that amount because he was obligated to pay other outstanding debts, and feared that if he lost the case, the credit union would move to place a lien on his mobile home/real property, the only real asset he had to pass onto his children.

The CCLS staff attorney took on the case and helped client respond to the discovery request from the opposing party, and propounded discovery to the other side on behalf of client in kind. There was a protracted legal dispute over discovery procedures and timelines between the credit union's attorney and the CCLS staff attorney that took weeks to resolve and nearly went before the court for a contested hearing and imposed resolution. However, after the discovery dispute settled and discovery was completed, the staff attorney and the credit union's attorney entered into settlement talks. The parties, after a great deal of back and forth and negotiating, settled the case for \$1,000.00. Client, by that time, had paid off several other debts and was able to afford the settlement and quickly paid it off with a single payment. The case was dismissed with prejudice and Client has been much more at ease knowing that the debt lawsuit is behind him and that his mobile home and property are secure from a lien.

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Optional Information on  
Collaboration with Other  
Advocacy Groups

January 2017 - Attended Merced County AAA Advisory Council meeting, 1/23/17 Advisory Council Meeting 2/27/17	February 2017 - Attended AAA
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**PSA: 32**

**Provider: Legal Services for Seniors**

**Counties: Monterey**

Optional Success  
Story(ies)/Case Summary(ies)

<p>Optional Success Story(ies)/Case Summary(ies)</p>	<p>Notable Cases - End of Life Legal Issues including Advance Health Care Directives (AHCD's) &amp; Wills:</p> <p>(1) Mrs. Curtis, a 77-year old widow was doing a little spring-cleaning when she came across a Will she had "hand-written" many years ago. She called LSS to see if it was "still good." A review of her holographic (hand-written) Will lead to a discussion of "end-of-life" legal issues. A LSS attorney provided her with a new Will and Advance Health Care Directive covering the disposition of her property and personal medical instructions in case she was unable to speak for herself during a medical emergency. All at no-cost to Mrs. Curtis.</p> <p>(2) Mr. Lee, a 68-year old veteran was worried about his future after an extended stay in the hospital for a bad fall. He wanted his son to be able to take care of his finances and make health care decisions for him in case he was unable to. A LSS attorney met with Mr. Lee at a local senior center where he has lunch. The senior center is one of ten weekly outreach sites throughout Monterey County where we help clients. The LSS attorney provided an ACHD specifying Mr. Lee's health care instructions and appointing his son to make financial and health care decisions for him in case he was unable to do so himself. All at no-cost to Mr. Lee.</p> <p>Achievements – Community Education and Assistance to Veterans:</p> <p>(1) This year marks the fourth consecutive year LSS has co-sponsored the Senior Day Resource Fair (SDRF) at the Monterey Fair Grounds. The SDRF is Monterey County's biggest and best attended senior resource fair with 38 exhibitors and 1,100+ seniors in attendance this year (a record high).</p> <p>(2) LSS continues to increase our assistance to senior veterans at the Vet Connect Resource Fair (a new event modeled after the SDRF) and the Stand Down For Homeless Veterans (this unique event, providing assistance to homeless veterans is in the process of being replicated throughout the county).</p> <p style="text-align: right;">*ALL NAMES ARE CHANGED TO PROTECT CLIENT CONFIDENTIALITY</p>
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Optional Information on  
Collaboration with Other  
Advocacy Groups

Legal Services for Seniors continues to collaborate with the Alliance on Aging, the Area Agency on Aging, Watsonville Law Center, the Santa Cruz Senior Citizens Law Center, other agencies and organizations.
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**Provider: Greater Bakersfield**

**Counties: Kern**

Optional Success  
Story(ies)/Case Summary(ies)

Optional Information on  
Collaboration with Other  
Advocacy Groups